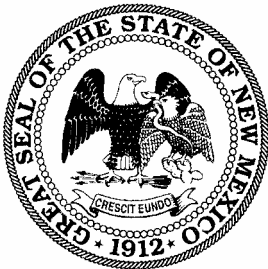# RFP Response RFP# 90-370-00-00011
SRS SRD Supporting Document

STATE OF NEW MEXICO
New Mexico Secretary of State Office

New Mexico Secretary of State Operation Services RFP

Submitted to:
Kathleen Y. Branchal – Purchasing Agent
Secretary of State Office
c/o State Purchasing Division
1100 St. Francis Dr., Suite 2016
Santa Fe, NM 87505
(505) 827-3632 Telephone

Dated: May 19, 2009

Proposal for:
New Mexico Secretary of State Operation Services RFP# 90-370-00-00011

Submitted to: Kathleen Y. Branchal
New Mexico Secretary of State Office Purchasing Agent
(**"State"** or **"you"**)

Submitted by: William Welge
President & COO
RecordFusion, LP, a Pennsylvania limited partnership
(**"RecordFusion"** or **"we"**)

Table of Contents

A. INTRODUCTION

RecordFusion's comprehensive records management solution will include the following features for the document types processed and maintained the New Mexico Secretary of State's Office:

Partnerships

- Cashiering
- Document Management - Indexing/Imaging
- Redaction
- Automated Indexing
- Search/Public Inquiry
- eRecording
- Web Enablement
- Reporting
- Workflow
- Conversion from existing system

RecordFusion offers a total records management solution for government offices. Our Solution encompasses the latest security and technologies through a full-spectrum of services enabling your office to reach three vital initiatives:

- *Digitize the Past*

  RecordFusion helps government offices digitize the past by converting historical land records into an easy-to-manage electronic format. Using StateFusion technology, we scan and index your archived records so you won't have to rely on original formats that are fragile and difficult to store and access.

  Features:

  - Images and indexes film, fiche, books, aperture cards and maps
  - Legacy database conversions
  - Data authentication
  - Quality Control Reporting
  - Film Archival

- *Automate the Present*

  RecordFusion helps government offices automate their records management, maintenance, and reporting processes with StateFusion, our customizable solution for recording offices. With RecordFusion, you can have peace of mind, knowing that your public records are organized, accurate, and supported by our ongoing service, support and development. Our StateFusion technology is designed to help

you serve your constituents with more speed and quality. Your staff will find it easy to use our system, because we design your customized system with their workflows and most important tasks in mind. With StateFusion you'll quickly gain quantifiable improvements and peace of mind for your entire team.

- Imaging
- Batch-scanning
- Cashiering
- Receipting
- Invoicing
- Advanced Indexing with OCR / ICR technology
- eRecording
- Redaction
- Comprehensive Reporting
- Customized public search State Portal
- Custom public search web portal
- Integrate able with other systems within the State

- *Secure the Future*

RecordFusion helps government offices secure the future by providing state-of-the-art backup and file protection services to keep public records protected from catastrophic loss. In addition, we are experienced in helping recording offices proactively develop a strategy for preserving, protecting, and recovering records in post-emergency situations.

- Central, secure database
- Redundant server off-site
- Disaster Preparedness
- Records accessible 24/7
- 4 levels of Replication: 1) on-site backup to tape; 2) replication to data center; 3) backup to tape at data center; and 4) archival to microfilm

General Features

- Streamlined information system with extensive reporting tools and drill down capabilities
- Intuitive system design providing flexibility to customize the unique operations requirements
- Powerful, yet simple to use, graphical interface
- Scaleable; designed to meet the needs of increased demand due to growth or interest rate fluctuations
- Utilizes industry standards for seamless communication between government and private sectors
- Tools to minimize keying errors and quality controls for corrections

Recording and Indexing

- Automated and streamlined recording process improving turnaround times
- Advanced indexing procedures utilizing Cover Sheets, bar code scanning and Optical Character Recognition (OCR) / Intelligent Character Recognition (ICR) functionality to expedite process
- Cashiering functionality to quickly receive payments, issue receipts and maintain accurate records through detailed close out reports which can be customized to suit your needs
- Quality controls with custom validation points, required fields and checklists to reduce errors and increase standardization
- Detailed audit trail for monitoring performance and usage
- Reporting functionality to produce required/desired reports

Administration

- Ease of setting-up users, permissions and preferences
- Permissions defined access
- Ability to quickly switch login to enable people to use different workstations and still maintain accurate audit trail

Advanced Technology

- Current and innovative technology that is not limited in development due to legacy systems or outdated code
- Redaction capabilities to protect sensitive information
- OCR/ICR technology to expedite indexing
- Ability to segregate confidential records in the database and limit access to sensitive information through login privileges

Integration Capabilities

- System integrates with or 'talks to' scanners and printers to enable one-stop functionality from system
- Ability to integrate across multiple platforms and divisions of government; elimination of redundant data entry preparing for future development of State portal

Redundancy of Database

- Secure storage of data and images and automatic back-up in a redundant database
- Disaster preparedness

- Secure website and State Portal that is intuitive and easy to use
- New Mexico Secretary of State website for improved service and communications to public
- Advanced search functionality to improve experience for agents and public
- Professional / advanced searches for agents
- Simple searches for general public

B. TRAINING

RecordFusion Training

RecordFusion's installation and implementation process for your Office includes all of the support and training required to execute your electronic recording and ensure a seamless transition. Since the RecordFusion Solution is tailored to meet your office's specific needs and own workflow(s), the training provided is also tailored. During the implementation process, RecordFusion maps out your workflow(s), as well as the roles and responsibilities of the staff. Our training program has been customized to suit all the various roles within the State office.

The training is conducted on-site and we combine class room training with on-the-job training which has proven to be very successful. Our implementation plan includes a period of time when our Solution is set up in parallel to your current system. This provides the environment to conduct user acceptance and on-the-job training as well. This allows the State to 'test drive' the Solution in your own environment before you 'go live'.

The training provided for other clients and users of our system has been very successful. The system is designed to be user friendly and intuitive. Even 'non-computer literate' individuals become very excited during training because they are able to understand and use the interface in a short period of time.

RecordFusion's training includes, but is not limited to, the following:

CLASSIFICATION	TIMEFRAME	SUBJECT MATTER	HOW CONDUCTED
System Administrator(s)	1 Full Day (classroom style) 3 Days of On-the-Job during implementation	Overview of entire system Setting up users Configuring of system Special edits	On-site; classroom style usually in conference room or such where there are no interruptions Can be conducted off-site if desired
All Internal Users	2 Hours	High level view of overall system to see how flow works and how the roles work together. Provides opportunities for questions Explain how detailed training will be done	On-site; classroom style usually in conference room or such where there are no interruptions Can be conducted off-site if desired
Deputies / Supervisors	2 Hours + Oversight	Details of accepting, recording and validating documents Incorporate office rules and procedures	Classroom style Return to workstations for practice / oversight
Staff	1 Day: Classroom Style On-the-job training / oversight during implementation	Subject matter is geared toward the roles & responsibilities of staff members; usually break-out into Recording/Indexing, etc. Some Counties want all to be crossed trained.	Classroom style Return to workstations for practice / oversight
General Public	1 to 2 Hour-long Sessions (depending if implement cover pages)	How to use online services	On-site / Classroom Style On-line via the Internet
Title Searchers / Agents/ Attorneys	2 Hour -long Sessions	How to use online services Benefits	On-site / Classroom Style On-line via the Internet

Training materials and manuals are provided during the training. Ongoing updates and support materials are provided for the staff. The Online Services will also have the manual provided in the electronic version of our response to guide the users.

RecordFusion also plans to make annual user group meetings, scheduled in conjunction with State conferences, as a standard part of the organization to help drive product direction, address customer issues, inform customers on product feature/function and direction, provide product training sessions, identify industry trends, and facilitate industry knowledge transfer.

C. ANNUAL MAINTENANCE & SUPPORT

RecordFusion System Support

Annual Maintenance and Support
As with all of our customers, we will provide unsurpassed customer service. Our clients are our future and we listen to your feedback to ensure our solution meets your ongoing needs. We don't settle for satisfied customers, we strive for Raving Fans.

Your annual maintenance package that we propose includes:

- ✓ System upgrades performed seamlessly to ensure no downtime
- ✓ Training on any new features and functionality
- ✓ Updated training materials
- ✓ Phone support and on-site support as required

We will work with your office to continually improve the functionality of our solution as well as incorporate other State departments in order to create a total State solution.

Our Annual Maintenance and Support Fee includes the services to enable the Licensed Program to perform in accordance with its Product Documentation, including the following services.

- **Standard Phone Support**
  Monday through Friday 8:00 am to 8:00 pm EST with 15 minute call back (excluding federal holidays)

- **Standard Pager Support**
  Monday through Friday 8:00 am to 8:00 pm EST with 15 minute call back (excluding federal holidays)

- **Extended Page Support**
  8:00 am to 4:30 pm EST Saturdays, Sunday and federal holidays with half hour call back

- Any changes, modifications, enhancements or other improvements to the Licensed Program Revisions to comply with any state mandates

- All new product versions of the Licensed Program – upgrades are done seamlessly. Any necessary file conversions will be handled by RecordFusion

- Updated training materials, product documentation and release notes

- Correction of any errors and defects in the Licensed Program as delivered to State that are identified by State and disclosed in reasonable detail to Company

- Correction of any errors and defects in the Licensed Program that are identified by Company

- Repair and replacement of any defective recording medium on which the Licensed Program is recorded

- Any OEM warranties on hardware will be passed onto State

- Other user group services (Newsletters, Product Briefings, User Group meetings etc. as they are available)

RecordFusion may require remote access to the Licensed Program to fulfill its Maintenance Requirements hereunder. Such remote access will be provided as is reasonably necessary to allow Company to fulfill its Maintenance Requirements hereunder, and subject to the State's security requirements.

At all times 4-8 staff are allocated to hardware/software help desk support.

At all times 4-8 staff is allocated to implementation and training at customers sites.

A separate quality control/testing group made up of 2 staff ensures the successful evolution of the StateFusion application.

RecordFusion support group is made up of Help desk and installation support personnel. Staff, while not involved in an install, is providing help desk support for the RecordFusion customer base.

D. RECOMMENDED HARDWARE

Recommended Minimum Hardware Requirements

RecordFusion recommends hardware listed below with specifications for optimum results when using the StateFusion application. Pricing for necessary hardware based on our assessment of your office has also been provided shall the State choose to have RecordFusion coordinate the purchase.

SERVERS

Database / Image Server
Recommended Model: DELL PE 2950 or higher
Processor: Quad Core Xeon E5405 processor2x6MB Cache, 2.0GHz, 1333MHz FSB
Memory: 8GB
Hard Disk: per specifications
O/S: Red hat Enterprise Linux 4.5 ES 64 Bit

Application / Web / Report Server
Recommended Model: DELL PE 2950 or higher
Processor: Quad Core Xeon E5405 processor2x6MB Cache, 2.0GHz, 1333MHz FSB
Memory: 8GB
Hard Disk: 2 x 146 GB,
O/S: RHEL ES 4 64 Bit

External Web Server , if Required
Recommended Model: DELL PE 2950 or higher
Processor: Quad Core Xeon E5405 processor2x6MB Cache, 2.0GHz, 1333MHz FSB
Memory: 8GB
Hard Disk: 2 x 146 GB,
O/S: RHEL ES 4 64 Bit

OCR/ICR Server
Recommended Model: DELL OptiPlex 755 or higher
Processor: Intel Core 2 Duo E65550/2.33GHz, 4M, VT 13333 MHz FSB or higher
Memory: 2 GB
Hard Disk: 160 GB
O/S: Win XP Pro SP3

Backup Server, if proposed
Recommended Model: DELL R300 or higher
Processor: Quad Core Xeon X3353 Processor2x6M Cache, 2.66GHz, 1333MHz FSB
Memory: 4GB
Hard Disk: per specifications
O/S: Windows 2003 R2 Std Edition, 64 Bit

Backup Device, if proposed
Recommended Model: ML6010 or higher
Drive Type: LTO 4
Connectivity: Fiber

STORAGE

Storage, if proposed
Recommended Model: EMC CX 300 or compatible
Disks Type: Fiber Channel 146GB, 15K RPM
Raw Capacity: per spcifications
Host Bus Adapter: Qlogic 2460, 4Gbps
Fiber Channel Switch: McData 4400, 4Gbps

WORKSTATIONS

Staff Workstations
DELL OptiPlex 755,
Processor: Intel Core 2 Duo E65550/2.33GHz, 4M, VT 13333 MHz FSB or higher
Memory: 2 GB
Hard Disk: 160GB
O/S: Win XP Pro SP3
Minimum 19" flat panel monitor

Scan Workstations
DELL OptiPlex 745
Processor: Intel Core 2 Duo E65550/2.33GHz, 4M, VT 13333 MHz FSB or higher
Memory: 2 GB
Hard Disk: 160GB
O/S: Win XP Pro SP3
Minimum 19" flat panel monitor

PRINTERS

Network Printer
HP LaserJet 3005dn or compatible

Black print speed	Up to 35 ppm
Black print resolution	Up to 1200 x 1200 dpi
Duplex printing	Automatic (standard)
Print technology	HP FastRes 1200
Printer memory	80 MB
Processor	400 MHz Motorola ColdFire V5
Supported paper sizes	Letter, legal, executive, 8.5 x 13 in, envelopes
Duty cycle	Up to 100000 pages
Paper handling	100-sheet multipurpose tray, 500-sheet input tray, automatic duplex printing
Recommended monthly volume	1500 to 5000

HP LaserJet 2015dn or compatible

Print speed, black	Up to 27 ppm
Print quality, black	Up to 1200 x 1200 dpi
Paper trays, std.	2
Duplex printing)	Automatic (standard)
Paper Handling, Input (standard)	250-sheet input tray, 50-sheet multi-purpose tray
Paper Handling, Input (optional)	Optional 250-sheet input tray
Paper Handling, Output (standard)	125-sheet output bin
Media sizes, std.	Letter, legal, executive, index cards, envelopes
Memory, std.	32 MB
Monthly volume (duty cycle):	Up to 15000 pages

Receipt / Validator Printer
Epson TM_J7100
Printer Specifications

Print method	Serial inkjet, 128 nozzles
Print resolution	180 dpi x 180 dpi
Interface	RS-232,Bi-dorectional parallel, Dealer options: RS-485, USB, Ethernet, IBM® P7, and Connect-It* family

Bar Code Label Printer
Zebra TLP2824 or compatible
PRINTER SPECIFICATIONS

Resolution	203 dpi (8 dots/mm)
Memory	Standard: 128 KB SRAM; 512 KB Flash
	Optional: 256 KB SRAM; 1 MB Flash
Print width	2.2" (56 mm) maximum
Print length	11" (279 mm) with standard memory
	22" (584 mm) with expanded memory
Print speed	4" (102 mm)/sec
Media sensors:	Transmissive
	Reflective

SCANNERS

Scanners
Fujitsu Fi-5650C

Technology	Dual charge coupled device (CCD) image sensor
Monochrome & Grayscale/Color	50-600dpi
Optical Resolution (dpi)	600
Image Processing	Dither and error diffusion
Grayscale	10 bits (internal), 8 bits (output)
Document feeding mode	Automatic document feeder (ADF)
	ADF capacity 200 Sheets (letter/A4, 20 lb.)
Document size	ADF minimum A8 (2.1 in. x 2.9 in.)
	ADF maximum 12 in. x 18 in.
Long Document Scanning	34"

Interface	Ultra SCSI (50m) / Hi Speed USB 2.0	
Scanner Memory	256MB	
Software Driver Support	ISIS and TWAIN driver included (Win 98 SE/2000/NT/XP)	
Scanning speeds		
Letter/Portrait Mode		
Monochrome, Grayscale & Color	Simplex	Duplex
@ 200 & 300 dpi	57 ppm(1)	114 ipm(1)
Letter/Landscape Mode		
Monochrome, Grayscale & Color	Simplex	Duplex
@ 200 & 300 dpi	71 ppm(1)	142 ipm(1)
Average Daily duty cycle	Up to 8,000 documents per day	
Limited Warranty	3 months on-site	

Fujitsu Fi-5530c2

Technology	Dual Color Charge Coupled Device (CCD) image sensor	
Output Resolution (dpi)	Monochrome 50 - 600	
Grayscale/Color	50 - 600	
Optical Resolution (dpi)	600	
Halftone patterns	7 dither, 1 error diffusion, and 1 downloadable	
Grayscale	10 bit/1024 level (internal), 8 bit/256 level (output)	
Scanning speeds		
Letter/Portrait Mode		
Monochrome, Grayscale & Color	Simplex	Duplex
@ 200 dpi	35 ppm(1)	70 ipm(1)
Letter/Landscape Mode		
Monochrome, Grayscale & Color	Simplex	Duplex
@ 200 dpi	50 ppm(1)	100 ipm(1)
ADF capacity	100 Sheets (letter/A4, 20 lb.)	
Document size	ADF minimum	A8 (2.1 in. x 2.9 in.)
	ADF maximum A3 (11.7 in x 17 in)	
Interface	Ultra SCSI / High-speed USB 2.0	
Scanner Memory	64MB	
Daily Duty cycle	4,000 pages	
Limited Warranty	3 months on-site	

BAR CODE SCANNERS

Metrologic MS9520 Voyager RS232

Barcodes	Codabar, Code 11, Code 128, Code 39, Code 39 Full ASCII, Code 93, GS1 DataBar, Interleaved 2 of 5, MSI-Plessey, UPC
Features	Triggered
Light Source Wave Length	650 nm
Max Scan Field	9.8 in
Max Working Distance	8 in
Min Scan Field	2.52 in
Minimum Bar Width	5 mil

Pitch (Degrees)   68
Print Contrast Signal (PCS)   35%
Skew (Degrees)   52

E. SYSTEM SECURITY

The RecordFusion system has multiple levels of security:
- Each task has a permission associated to it, allowing the State to restrict access to sensitive tasks (such a Voiding documents).
- Document types can be configured such that new documents of that type cannot be created / deleted or viewed unless the user has the permission to do so.
- Specific documents can be marked as Secure Data or Secure Image- preventing access to the document by non-authorized users.
- Transactions can be set to a status that prevents new activity from occurring on that transaction.
- The data for Cases, Transactions or Documents can be configured such no additions / edits can be made by non-authorized users.
- Documents cannot be associated to a terminated UCC file number unless the user is authorized to do so.
- The StateFusion system can be configured to aid users in locating sensitive information on document images. Users can mark that data - creating a 'redacted' version of the image to displayed to non-authorized users. The original version of the image will remain available and unaltered to those with permission to view it.

RecordFusion's system security is very robust. Password-only access is provided. User Administration is easy to use and allows the office system administrator to specify exactly what each user is allowed to do in the system. The Secretary of State directs how the security levels are defined in your office. Various 'User Groups' can be established in the system and then users can be assigned to groups. During implementation, RecordFusion works with you to understand the various tasks in the system and set-up your user groups. These can be revised by the system administrator as desired. In addition to the security level, our audit function tracks everything done in the system by each user, when and at which workstation. This includes tracking of all file access and activity.

Security Procedures
Since each State is unique and has its own security requirements, RecordFusion works with you office on our proposed solution for corrections or additions to records. The system supports maintaining comments on any changes to a record and tracks who makes changes. We recommend that your office only allow certain personnel to have the permissions to make certain changes in the system.

Image Security
Only users with the correct permissions have the ability to scan records and the images are automatically loaded to the system to the correct document number. These files cannot be altered

External and Internal Security and Connectivity

The external site is hosted on a web server which sits in a DMZ area between the internet and the internal network. The only function of this server is to run the web site. All other services on this machine will be turned off. The only connection between this server and the internal network is for database and image requests.

Internal Site Security

The internal site is secured using standard Windows domain security. All images are stored on a windows file server and only those workstations that perform scanning functions have write access to that file system. All other machines have read only access to the file system. The database files are stored outside the shared area and are only accessible through the database connection. Only authorized users are allowed logins to the servers.

All images are kept in the file server with access to the file controlled through a shared drive. Only users who have a need to write images (generally only those doing scanning, image cleanup, or redaction) are allowed to write to this drive. In addition, the State will specify the users who will have the ability to delete files from this share. In the normal course of duties, there is no reason to delete a file from this file system. All other access to this drive is read only. Windows Server auditing will be set up on those folders to write an audit log of anyone who creates, modifies or deletes a file in the image folders. The audit will also log any user who attempts to do any of these actions, even if they don't have permission to do so.

RecordFusion provides multiple levels of redundancy of data for back-up and disaster recovery. System Backup is critical to us as well as to our clients. Your data will reside on server(s) at the State office. A secondary back-up server will be located at our New Castle, PA Data Center/Disaster Recovery Location. Replication between the your office and the Data Center will occur in real-time, thus ensuring back-up of both images and indexing data.

The State and Data Center server will be RAID protected with hot spares and an unattended tape backup will be provided in the State server, thus ensuring 4 levels of backup and redundancy with the 5th level of redundancy being the archive of images to microfilm for storage. There is no intervention or assistance required from the State, other than the periodic removal and replacement of tapes for off-site storage at the RecordFusion Data Center or a site identified by the State.

Power Outages

A dedicated UPS is recommended for the server with software that ensures a 'smart' shut-down of the server. The UPS provides about 10 minutes of power and ensures an orderly shut-down of the server. The UPS is included in the hardware specifications. Also, if there is a power outage, RecordFusion, with the replication of the data to our Data Center with 24/7 operation and fully redundant power will have the data available via the web, even if the State office is not operational due to a power outage or other disaster thus ensuring service to your constituents.

Prevention of Data Loss

StateFusion provides 5 levels of data redundancy including replication and storage in a fully secure 24/7 operational facility with redundant and alternative power to ensure the security of the State data and images and protecting against data loss.

RecordFusion will comply with the installation timeline desired by the State and will provide follow-up once the software is in production to provide full assistance to staff.

F. CONVERSION

Data Conversion

RecordFusion realizes that a successful data conversion is critical to a successful implementation of our software. We ensure a timely and successful conversion of your current data. This expertise has allowed us to successfully convert numerous databases from multiple formats. We employ strict quality controls to ensure the integrity of your data. Testing and acceptance is done before your go-live date.

The RecordFusion team has imported and converted land records from numerous types of databases and files, including the majority of the state of Florida. Our approach to data conversion is to receive a sample file from your current system, evaluate the file layout, determine file mappings and then determine the best way to convert into StateFusion. Our required file format is quite flexible.

RecordFusion recommends following the PRIA standard XML output format when converting data. Since RecordFusion is very familiar with the different ways counties save their data from having converted data from over one hundred (100) counties, we are aware that you may have special indexing requirements and methods. For this reason, we analyze your records and do the work in mapping the data properly. Our team will work with your State to properly understand your indexing procedures.

Please note that the data conversion does not include verification of the accuracy of the existing indexed data. RecordFusion does provide queries that identify suspicious index content for the State's review. We ensure that all current data is converted into the new system correctly and is available for your end users.

Image Conversion

RecordFusion will install and completely support an imaging system which is an integral part of the StateFusion application. This system is completely capable of managing mass storage as well as expeditious retrieval of images from all date ranges stored on the system. The only limitation that may exist in relation to the Imaging Software would be the amount of storage space utilized within the system. Any expandable system will allow our solutions to provide seamless retrievals of mass quantities of images and data. This feature was designed into our system with the anticipation that file sizes, quantities and record databases would reach extremely large sizes.

RecordFusion will supply documented procedures for all data migration from an existing system or existing data files from previous records management systems. A complete authentication of the data will be performed followed by a detailed analysis of the data which will follow a stringent set of predefined standards to ensure data integrity. Following the analysis of the data, RecordFusion will generate very detailed reports which will be shared with the Recorder of Deeds office for review. This report will identify any gaps in sequence data, inconsistencies in data and general data integrity throughout the migration process.

During the migration process, RecordFusion will also perform an extensive pagination process to cross-link all data to the associated images. During this process, a rigorous Quality Assurance process or standard is adhered to in order to ensure a clean migration to our system. All functions within these processes are followed by detailed reporting of any errors, omissions or anomalies throughout the migration process.

The image file headers utilized within the StateFusion application are all non-proprietary and standard image file formats. The image processing is designed to utilize a typical TWAIN driven devise which will export an image to any typical TIFF Group 4 compression image file format. Our file formats are based on client requirements and all associated documentation will be provided as necessary.

Below is a high-level overview of RecordFusion's data conversion process:

Data Conversion
- Receive Data & Images from State/Vendor in Agreed Upon Format (timeliness is critical to meet deadline)
- Review & Assess Data
- Confirm All Fields & Clarify Mappings
- Map Fields
- Test Conversion & Provide Quality Report
- State Acceptance of Test Conversion
- Data Cleansing and Additional Testing
- Final Sign-off of Conversion by State
- Complete Changes and Conversion
- Receive Data Gap @ Day End
- Final Conversion (at night)

Detailed documentation will be presented upon contract award.

G. DATABASE

StateFusion uses SQL databases for all data associated with the system except images, which are stored in the file system. StateFusion has the ability to use MySQL. StateFusion uses a robust abstraction layer to talk to the database; if the customer requires a different SQL database the service can be negotiated for additional time and cost.

The RecordFusion Solution is a client-server implementation where there are multiple servers handling specific tasks and the clients are doing most of the work.

The standard configuration has:

- One database server running MySQL
- One file server running Windows Server 2003 or Red Hat Linux (using Samba)
- One or more application servers handling code updates to the Clerk's office workstations and handling all searches done from web-based clients.

At start of the application, the office workstations check the application server to see if there is a code update. They then run the code that talks to the database and file servers as needed to get the information to present to the operator. All other processing is done on the client workstation.

RecordFusion will be using RedHat Enterprise Linux ES 5 64 bit OS for the main servers. These servers will support the Database, Web / Application and images. Windows XP pro SP 2 operating system is being used for OCR module.

H. SAMPLE SYSTEM INTERFACE

The Control Menu is the main screen which has all the menu options to perform all tasks. To perform a certain task, either click on the text in the menu or select from the top menu.

Welcome Jeff Rothenberg

My Tasks

Passport
Passport Application Filing
Other Passport Forms Filing
Create Passport Transmittals

Notary
Notary Oath
Notary Transfer
Notary Change / Renew
County Clerk Certificate

Trade Name
New Trade Name Filing
Amend / Dissolution / Discontinue Trade Name
Church Corp Filing
Trade Name Address Change
Certification of Trade Name
Business List Request

Misc Transactions
County ID Card
Naturalization Certificate Filing
Misc & License Transactions
Certified Document Copy
Copies

General
Edit Existing Transaction
Edit / Review Documents
View / Print Receipt & Documents
About CountyFusion

Cashiering
Close Out Drawer
Modify Transaction Payments
Modify Fees After Recording
Cashier Account Administration
General Legder Entry

Search
Search

Reports
Production Reports
Financial Reports
Letters and Forms

Administration
User Administration
Change Password
Notification Administration
Name List Administration
Charge Account Administration
Show Performance Metrics

Daemons
Daemon Schedule Administration
Local Daemon Control
Daemon Monitor
Service Monitor

Powered By RecordFusion

Partnership Filing

1. Search for Trade Names before processing.

2. Click on "New Trade Name Filing" on the Control Menu. A New Trade Name Filing Window will open, Click the Next button to proceed or press ALT+N on the keyboard.

3. Enter information into all applicable fields. All red fields are required.
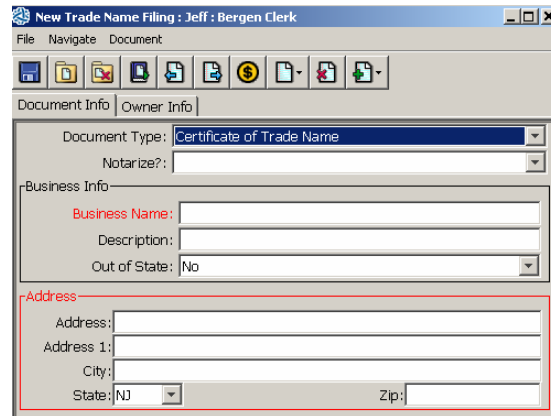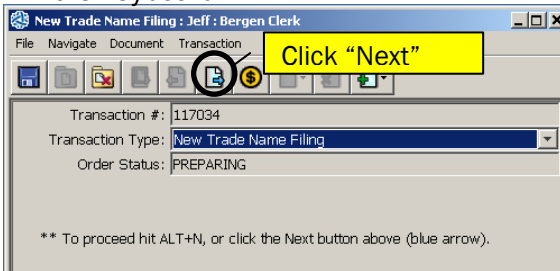
4. Click "Owner Info" tab and enter information into all applicable fields. All red fields are required.

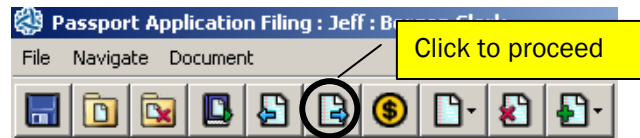5. Click "Add" button to include the Name with the Filing.
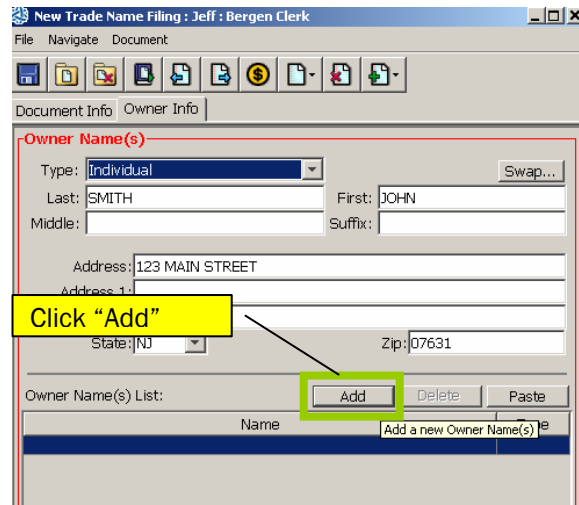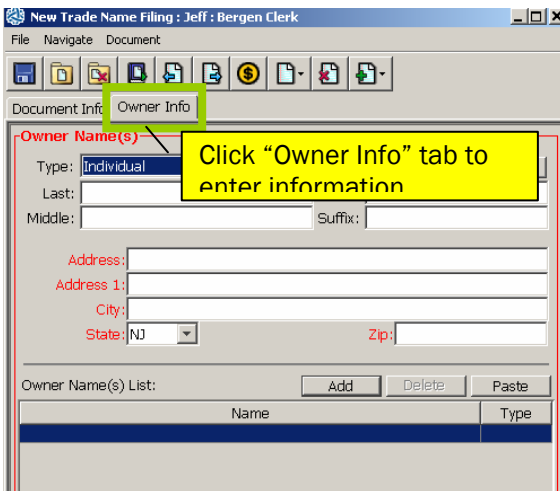
NOTE: Name(s) will appear on the bottom half of the screen once they are added. If the name doesn't appear there, it has not been added.
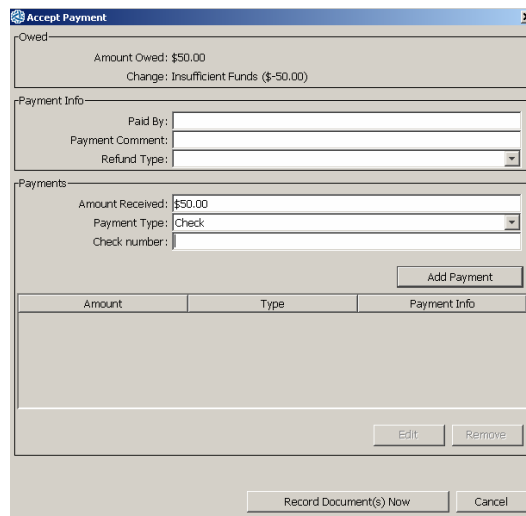

Added Names appear

11. Click the Next button to proceed.
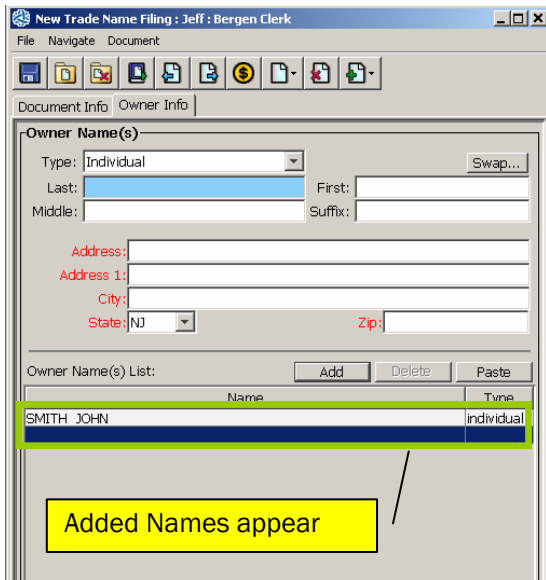
Click to proceed

12. Fee details will be displayed. Click "Accept Payment" button.

Click "Accept Payment"
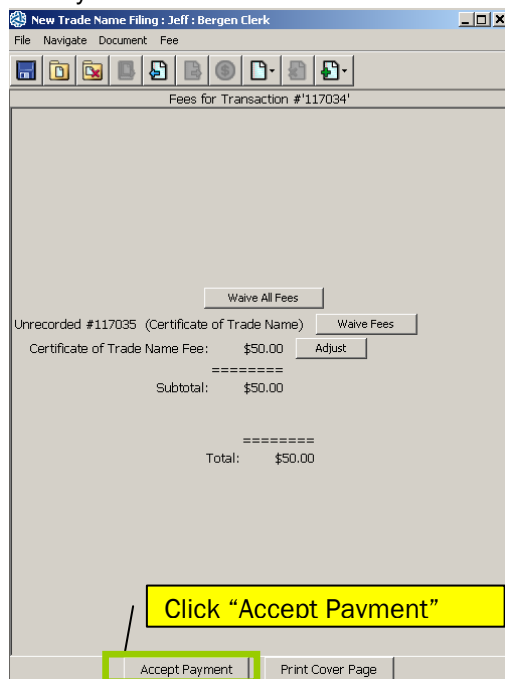
13. Payment window will appear.
Enter in Payment Information (Amount Received and select Payment Type).
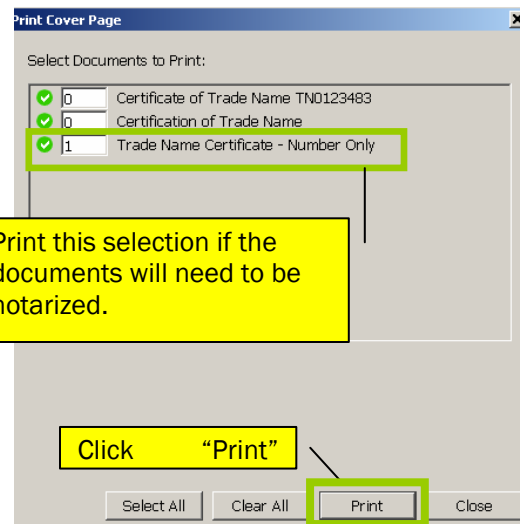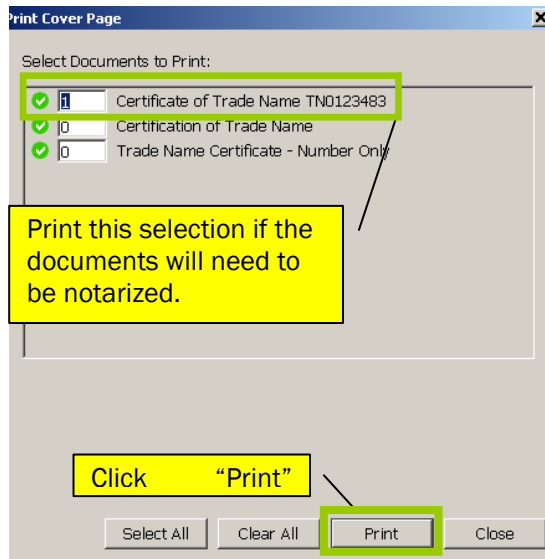Click "Add Payment" button.

14. A receipt will generate in Adobe PDF, click the print icon to print the receipt , select the Epson Receipt printer and click the "print" button.

15. If the Certificate of Trade Name needs to be Notarized, confirm there is a number 1 next to Certificate of Trade Name and click "Print" button. Printer selection should be HP Tray.

15a. If the Certificate of Trade Name forms are already notarized, confirm there is a number 1 next to Trade Name Certificate – Number Only. Pull out the HP Tray and place the documents there to print. Click the "Print" button.

Print Cover Page

Select Documents to Print:

1   Certificate of Trade Name TN0123483
0   Certification of Trade Name
0   Trade Name Certificate - Number Only

Print this selection if the documents will need to be notarized.

Click   "Print"

Select All   Clear All   Print   Close

Print Cover Page

Select Documents to Print:

0   Certificate of Trade Name TN0123483
0   Certification of Trade Name
1   Trade Name Certificate - Number Only

Print this selection if the documents will need to be notarized.

Click   "Print"

Select All   Clear All   Print   Close

Search Interface

The **Home Screen** is the launch pad to all Online Service.

Home | Search Public Records | Search Guide | Preferences | Open Print Queue | Contact Us

Welcome to County Online Services

What would you like to do today?

1. Search Public Records
2. Modify My User Preferences
3. F.A.Q.
4. Disclaimer
5. Log out

Announcements

The Home Screen gives you access to all of the Online Service's functions:

1   Begin a search through the public records.

2   Modify user preferences.

3   Frequently Asked Questions.

4   Review the Disclaimer.

5   Log out of the system.

The next section will cover searching. Click **Search Public Records** to begin.

Beginning your Search – The Search Criteria Screen

Select the **Search Type** from the drop-down list.

All Names
All Names
Instrument Number
Book - Page
Legal Description

Search Type: All Names

Display: 15 Records per page

Specific Criteria

Type: ○ Both ○ Party 1 ○ Party 2

Match: ☐ Exact ☐ Surrounding Names

Name: [   ] ?

(Example: IBM Inc or Smith John)

Recorded Date From: [   ] To [   ]

Document Types:
☑ **All Document Types**
   ☑ **Deeds**
      ☑ ASSIGNMENT
      ☑ DEED
      ☑ MORTGAGE
      ☑ REL

Clear   Search

Click to clear entered criteria.

Click here to start search

Enter search criteria here.

Select the **Document Types** that you are searching for.

In the **General Criteria** section, you can change the:

- **Search Type**
  o **All Names** – searches for people and businesses; it is the default search type
  o **Instrument Number** – searches for a specific document by Document Number
  o **Book - Page** – searches for a specific document by Book and Page Number
  o **Legal Description** – searches for a specific document by legal fields, like Subdivision and Tract
- **Display**
  o Specify the number of document results to be displayed per page. Select a number from 10 to 100 from the drop-down list.

NOTE: While the General Criteria do not change, the **Specific Criteria** change based on the Search Type that you choose.

In the **Specific Criteria** section, enter your criteria for the search.

- **Party Type** – **Party 1** searches for only grant**or** or mortgag**or**, while **Party 2** searches for grant**ee** or mortgag**ee**. **Both** searches both types.
- **Match** – **Exact** searches exact match on your name only. **Surrounding Names** will also include names very near to the name you entered.

- **Name** – Enter the name of the party you are looking for. Be sure to enter in the form `Last First MI`.
- **Recorded Date** – Enter the date which the document was recorded.
- **Document Types** – Select the type of document you are searching for.

Search Results

When you are finished refining your criteria, click **Search** or press **Enter** to begin your search.

Search Results

Search Criteria: Search Type: All Names; Name: smith ...   All Criteria

🖨 **Print Results**   📋 **Back to Criteria**

Displaying 16-30 of 536 Items   Page 2 of 36 Go to page: ⬤   ⬅ ➡

Book / Page ▲		Name ▲		Other Name	Doc Type	Recorded	Verified
131 969	1	SMITH BETTINA L	2	REARDON PATRICK T ETUX	DEED	09/30/2005	✔
LOT: 13 EXT: B TRACT: NORTH COMMUNITY 3 (NC3)							
128 934	2	SMITH BETTINA L	1	NEW CENTURY MTG	REL	03/28/2005	✔
LOT: 13 EXT: TRACT: NORTH COMMUNITY 3 (null)							
128 244	1	SMITH BETTINA L	2	B OF A	MORTGAGE	02/04/2005	✔
LOT: 13 EXT: B TRACT: NORTH COMMUNITY 3 (null)							
124 74	1	SMITH BETTINA L	+ 2	NEW CENTURY MTG	MORTGAGE	06/01/2004	✔
LOT: 13 EXT: TRACT: NORTH COMMUNITY 3 (null)							
124 73	2	SMITH BETTINA L	+	SMITH TRACY S +	DEED	06/01/2004	✔
LOT: 13 EXT: TRACT: NORTH COMMUNITY 3 (null)							
124 72	2	SMITH BETTINA L	1	SMITH BETTINA L ETAL	SEP PROP AGREE	06/01/2004	✔
LOT: 13 EXT: TRACT: NORTH COMMUNITY 3 (null)							
124 71	2	SMITH BETTINA L	1	SANDOVAL MARK SECUNDINO ETUX	DEED	06/01/2004	✔
LOT: 13 EXT: TRACT: NORTH COMMUNITY 3 (null)							
124 72	1	SMITH BETTINA L ETAL	2	SMITH BETTINA L	SEP PROP AGREE	06/01/2004	✔
LOT: 13 EXT: TRACT: NORTH COMMUNITY 3 (null)							

1 Click the blue underlined **Document Number** to view document information.

2 The search criteria are displayed here. Click **All Criteria** to see more.

3 Click to print the search results. This action displays a printer-friendly version of the results. Press **Ctrl + P** to print.

4 Click to return to the Search Criteria Screen.

5 Click the blue arrows to move forward and back through the pages of search results.

6 To jump to a page of results, enter the number of the page you want to jump to, then click the **blue circle** to jump to page.

7 A **green check** indicates that the document has been **verified**. A **red X** indicates that the document is **not verified**.

8 An underlined header like **Name** indicates that the column is sortable by that value. Click to sort.

9 A **1** next to the name indicates a party as **Party 1** (grantor or mortgagor), while a **2** indicates **Party 2** (grantee or mortgagee).

10 A **blue plus** indicates that there are additional names on the document. Click the **blue plus** to see the additional names.

11 Check the boxes next to the documents to queue them up in the Document Details screen.

Viewing Document & Details

Click the **Document Number** to view the document and its details.

The **History** drop-down list allows you to view and jump to any document that you have recently viewed.

Click the blue arrows to navigate to adjacent documents from the results list. If you used the checkboxes to select a list of documents, these arrows will scroll through the list.

Print the document.

Click **Hide/Show Details** to view only the document. Click again to view the details and image.

Use these controls to return to the **Search Results** and **Search Criteria** screens, respectively.

◄ Hide/Show Details   ☐ Back to Results   ☐ Back to Criteria

Search Details

Print a summary page of the document index information.

History: 183453 LAC-VACATE EASEMENT ▼

Document Info   Associated Documents

...ment Type: LAC-VACATE EASEMENT
...t Number: 183453
Book: 129
Page: 338
...ent Status: Recorded and Verified do...
...rded Date: 04/25/2005 03:48:00 AM
Returned Date:
Submitted By:
Comments:

Click the **Associated Documents** tab to view any documents that have been associated To or From the current document.

Legal Description

LOT: 117 EXT: TRACT: NORTH COMMUNITY 1

Name Information

The **Document Info** tab displays document information, legal descriptions, and name information.

Use these icons to navigate through the pages of the document.

Use these icons to zoom in on the image or change the way it fits in the window.
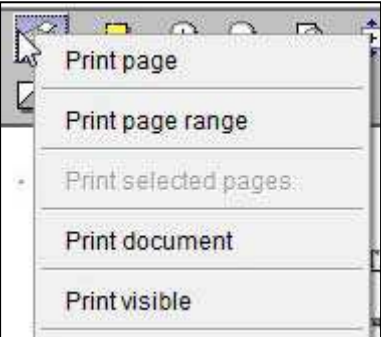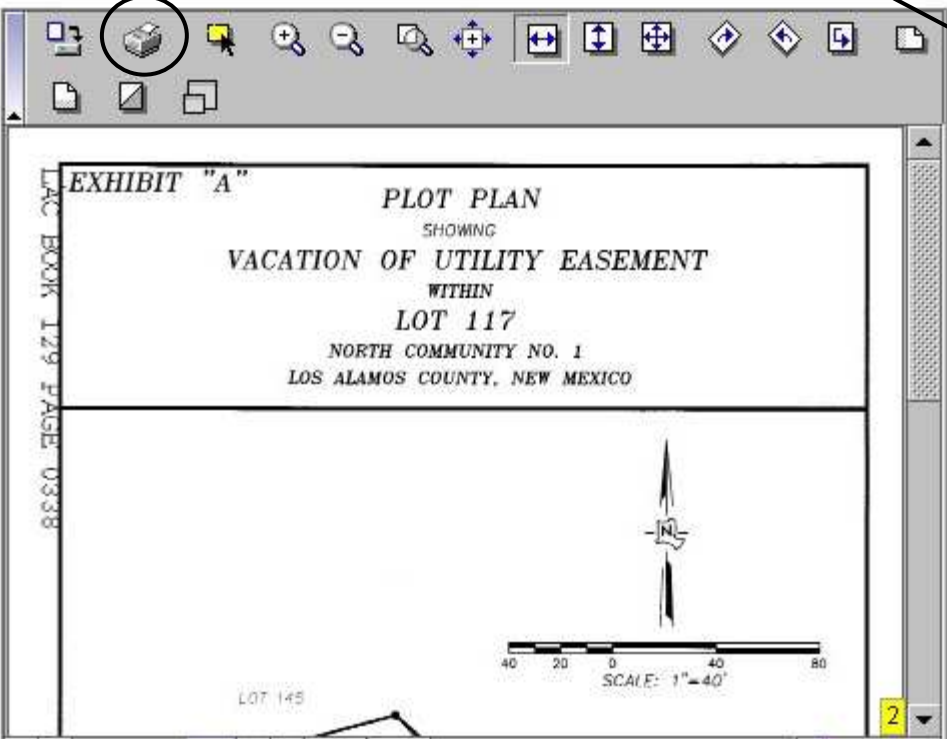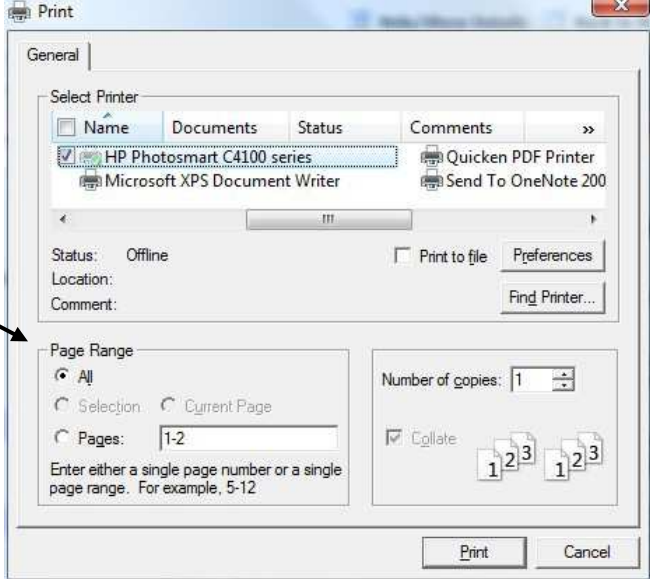
LAC BOOK 129 PAGE 0338

VACATION OF UTILITY EA...

OWNER: Adeline P. Smith, an unmarried woman.

PROPERTY ADDRESS: 2255 46th Street, Los Alamos, N.M. 87544

LOT: _117_, SUBDIVISION: _North Community No. 1_

The Incorporated County of Los Alamos has determined that the County no longer requires and hereby vacates the utility easement described as follows:

DESCRIPTION

That utility easement lying and being within Lot 117, North Community No. 1, Los Alamos County, New Mexico, the Plat thereof filed for record in the Office of the Clerk at Plat Book 1, Page 64 on September 10, 1965, as shown on that Plot Plan, dated April 1, 2005, marked Exhibit "A", attached hereto and made apart hereof.

This Vacation of Utility Easements in no way effects, reduces or diminishes any other Easement or Usage, either Drainage or Utility, held by the Incorporated County of Los Alamos except as herein specifically provided. All other Grants of Easement, whether Drainage or Utility, shall be and remain in full force and effect, including that recorded in the Public Records of Los

viewone

Click this yellow icon to change the image quality of displayed images. Each click will take the image one step in a cycle of resolutions.

Use these icons to change the way the document is displayed in the window. You can view thumbnails, two pages at once, and many more.

Printing Images

Click the **Print** icon to print the document. You can select the number of the page that you want to print.

Print

General

Select Printer

Name	Documents	Status	Comments	»
HP Photosmart C4100 series			Quicken PDF Printer	
Microsoft XPS Document Writer			Send To OneNote 200	

Status: Offline
Location:
Comment:

☐ Print to file   Preferences

Find Printer...

Page Range
◉ All
○ Selection   ○ Current Page
○ Pages: 1-2
Enter either a single page number or a single page range. For example, 5-12

Number of copies: 1

☑ Collate

Print   Cancel

EXHIBIT "A"

PLOT PLAN
SHOWING
VACATION OF UTILITY EASEMENT
WITHIN
LOT 117
NORTH COMMUNITY NO. 1
LOS ALAMOS COUNTY, NEW MEXICO

-N-

40   20   0   40   80
SCALE: 1"=40'

LAC BOOK 129 PAGE 0338

LOT 145

Print page

Print page range

Print selected pages

Print document

Print visible

Notice the other context options you have when you **right click** the print icon.

As you view each page of a document, you can select the individual page for printing by pressing the **S** key on your keyboard. You will see a yellow box with the page number to identify that the page has been selected for printing. This will automatically fill out the **Pages** field in the dialog box when you click the print icon.

Setting User Preferences

NOTE: You can only change preferences on your own use account. If you are logging in as **Guest**, the preferences are already defined and cannot be changed.

You cannot change your username once you have created your account.

The following Personal Information can be edited:
- Full Name (required)
- Password and confirmation
- Email Address (required)
- Address, City, State, and Zip Code

When you are finished setting your preferences, be sure to click **Save**.

Personal Information

X Cancel 🖬 Save
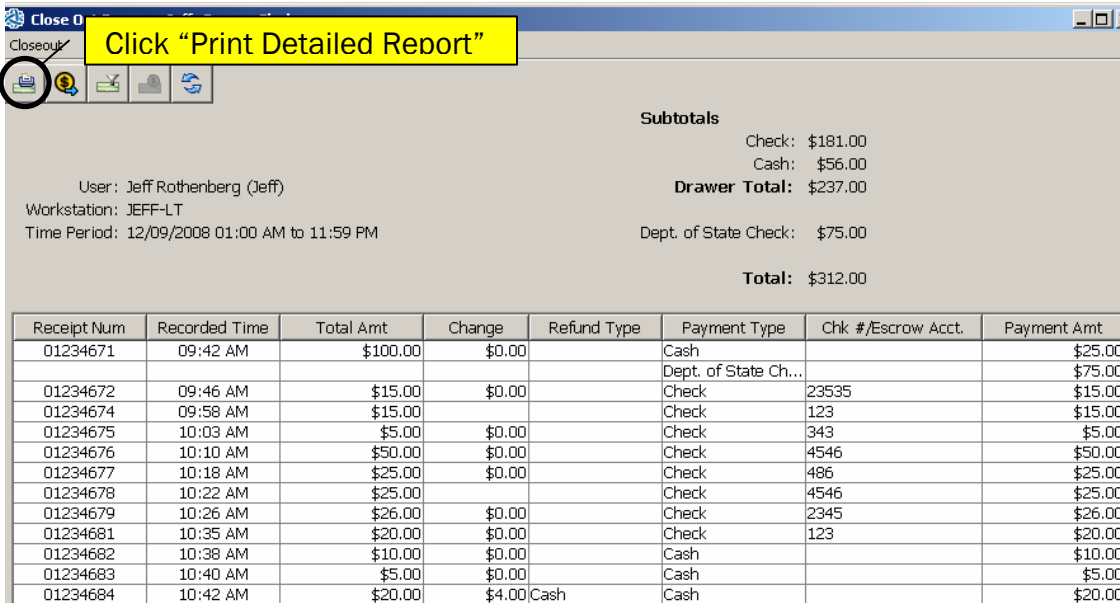
Username: jeff
Full Name:
Password:
Confirm Password:
Email Address:
Address:
Address1:
City:
State:
Zip Code:

Search Preferences

Display: 15 Records per Page
Record Date Sort Order: Descending
Search Criteria: Save Search Criteria between Searches
☐ Save Last Search Criteria between Logins

Set Search Preferences.

You can change the number of results that are displayed per page, how dates are sorted, and whether or not to save your search criteria between separate searches.

Closeout Drawer

1. Go to the Control Menu and click on "Close Out Drawer" in the Cashiering Menu.

2. A Close Out Drawer application window will open, listing all activity performed for the day. Click the "Print Detailed Report" icon to print a report to submit end of day cash and checks.

Click "Print Detailed Report"

Subtotals

Check:	$181.00
Cash:	$56.00
Drawer Total:	$237.00

User: Jeff Rothenberg (Jeff)
Workstation: JEFF-LT
Time Period: 12/09/2008 01:00 AM to 11:59 PM

Dept. of State Check:	$75.00
Total:	$312.00

Receipt Num	Recorded Time	Total Amt	Change	Refund Type	Payment Type	Chk #/Escrow Acct.	Payment Amt
01234671	09:42 AM	$100.00	$0.00		Cash		$25.00
					Dept. of State Ch…		$75.00
01234672	09:46 AM	$15.00	$0.00		Check	23535	$15.00
01234674	09:58 AM	$15.00			Check	123	$15.00
01234675	10:03 AM	$5.00	$0.00		Check	343	$5.00
01234676	10:10 AM	$50.00	$0.00		Check	4546	$50.00
01234677	10:18 AM	$25.00	$0.00		Check	486	$25.00
01234678	10:22 AM	$25.00			Check	4546	$25.00
01234679	10:26 AM	$26.00	$0.00		Check	2345	$26.00
01234681	10:35 AM	$20.00	$0.00		Check	123	$20.00
01234682	10:38 AM	$10.00	$0.00		Cash		$10.00
01234683	10:40 AM	$5.00	$0.00		Cash		$5.00
01234684	10:42 AM	$20.00	$4.00	Cash	Cash		$20.00

3. The report will generate in Adobe PDF. Click on the Print icon and the Printer selection should be HP Tray.

StateFusion provides the ability to capture financial information for all system transactions.

During the implementation process, StateFusion tracks all monies that are accepted in the by the Secretary of State's Office and how these monies are distributed. The fee calculations are set-up by document type to allow the system to automatically calculate fees and taxes. There is a one click 'Accept Payment' option that allows the clerk to accept the fees for the processed document(s). The system allows the State to accept whatever payment method(s) that they want. The system has validation points and checks to ensure the correct amount of money is entered for collection – must match payment due or can tell you what change is due or allows you to enter 'change' into an overage account. The receipt is automatically generated. The details displayed on the receipts are defined by the State.

The amounts of all monies accepted are stored in the system and posted to State defined General Ledger accounts if desired. Detailed reports are available for cash-out summary, receipt registers, etc. to ensure you have the correct information for balancing money, close-outs, auditors, etc.